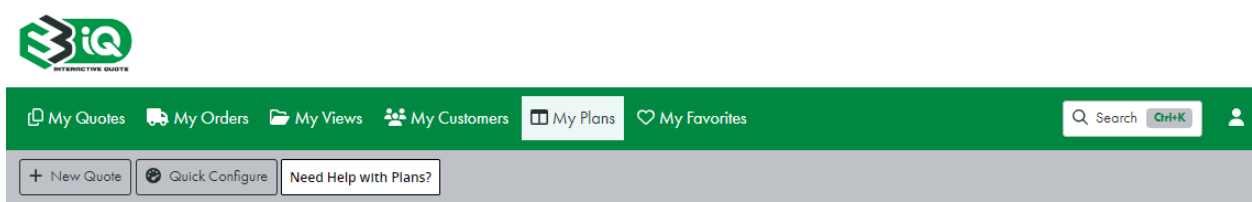


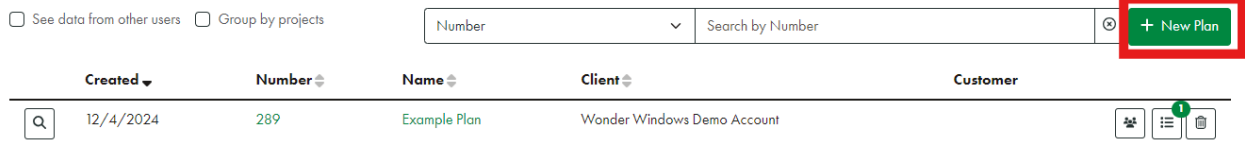
My Plans – EBM IQ

“My Plans” allows you to create reusable plans to more quickly create quotes.



Create a new plan, give it a name and add line items. Add additional details to this plan if the details will likely be kept when the plan is used to create a quote.

My Plans



Once created you can quickly turn a plan into a quote clicking “Create Quote” and then start to make any adjustments or changes for that specific quote.

